LLumin August 2019 Release Notes

READYAsset

Asset Improvements

Title: Organization of Assets

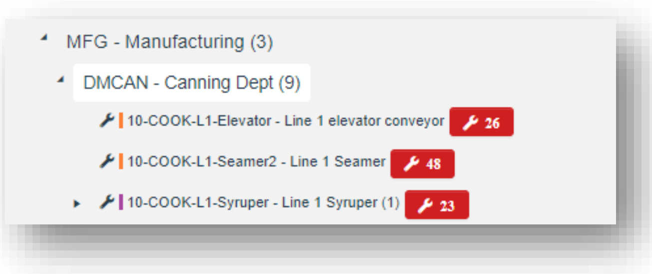
- If the logged-in User does not have “Asset-Move” rights, they will not be able to drag and drop any nodes within the Asset Tree.
- If the logged-in User does have “Asset-Move” rights, the following apply:
  - Only Asset nodes can be moved.
  - An Asset cannot be moved inside one of its children.
  - Confirmation dialog messages pop-up: “Move Asset?" and "Are you sure you want to move this Asset?"
- A preview of the move is also shown, with the following:
  - In the preview, if an Asset is being dragged to a parent Asset with no Division, the top node of the preview will read "No Organization"
  - The preview will draw an arrow from the current position to the new position
- Changing an asset’s Division, Department, or Work Cell triggers a message verifying that the change has been made.
- When an Asset’s organization changes, Users are able to capture the Reason for Change.
  - This is set via a system configuration called "Prompt User for a reason when moving an Asset in the tree".
- If an asset has a Parent, fields such as Division, Department, or Work Cell are disabled.
- If an organization field cannot be modified, hovering over this field will show the reason why.

Title: Asset Dates Off by 1 Day

- The asset installation date and replacement date are saving correctly. Previously they were off by 1 day.

Title: Asset Tree View

- Users can see how many open Work Orders are associated with an asset.
  - Via a red button, wrench icon and the number of open Work Orders next to it.
- Users can view the list of open Work Orders right from the Asset Tree View.
- Users can see any Parts linked to an Asset when viewing that Asset in the Organizational Tree.



Title: View Parts Linked to any Child Asset

- Users can view parts linked to any Child Assets by clicking on Linked Parts next to the Child Asset.

Title: Linked Work Tab

- All grids will be open by default. This default can be over-written if desired.

Title: Manufacturer’s Tab

- The Manufacturer Tab can be found in the Asset Master page.
- Manufacturer is now a type of vendor that individuals with Asset privileges can modify and/or create.
- The Manufacturer Tab has a button located next to the manufacturer. By clicking on this button, it will bring up the Manufacturer Support Contact card that pertains to the Manufacturer.
- To view additional information and make edits to the Manufacturer Information click on the button next to the Vendor ID.

Title: Manufacturer’s Tab Permission

- If the vendor class is 'Manufacturer' it will use Asset permissions, otherwise it will use Vendor permissions.
- This permission will dictate which cards/fields are shown.
  - For example, if 'Manufacturer' is chosen it will hide the 'Automatic Filters', 'eCommerce Integration' and 'Parts' cards.

Title: Condition Assessment

- A User with Asset Admin permissions can update the Condition Assessment checklist rather than just view it, by clicking on the view assessment button within the historical data grid.
- A User can change the ad hoc checklist entry only if they have Asset View rights.

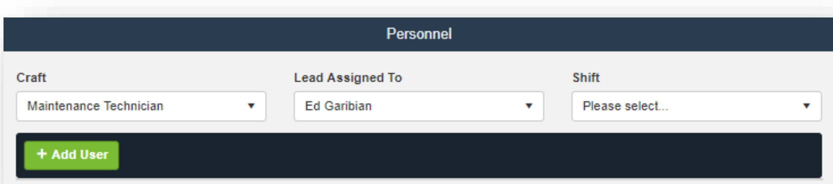
Title: Condition Based Triggers Tab

- SCADA tags can now be linked to assets in the application.

Work Order Improvements

Title: Personnel Tab

- Multiple Users can now be associate to a single Work Order and scheduling can be done individually.
- If the work order status is greater than or equal to Pending Approval:
  - No more Users can be added to the personnel list view & users cannot be scheduled
- The view has been converted from a grid view to a list view.
- Once a User has been added to the personnel list view, schedules can be added either manually in the grid or via the schedule button (calendar).



Title: View Linked Parts

- Users can view the parts linked to an Asset in a Work Order by navigating to the Asset Info.

Title: Work Order Error Fixed

- You can now delete equipment from work orders without receiving an error message.

Title: “All Day” Work Orders in Calendar View Fixed

- The Work Order Finder Calendar view has been modified to fit the “All-Day” entries.

Title: Updated ‘Assigned To’ Filter

- To accommodate the new ability to associate multiple personnel to a work order ‘Assigned To’ filter has been renamed to ‘Associated Personnel’.

Title: Work Order Finder

- A User can now filter by Asset Status.

Title: Edit Work Order After Approving Pop-Up Window

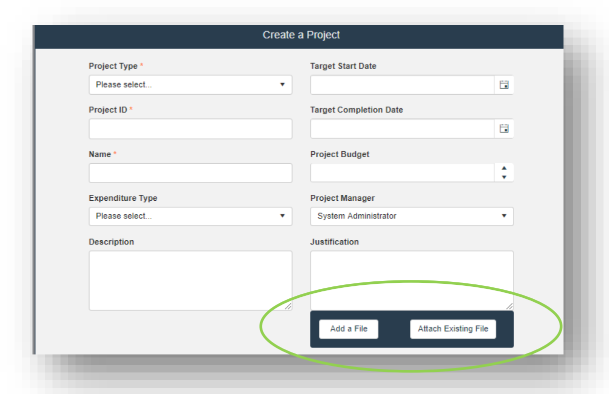
- When creating a Work Order from a Work Request there is now a pop-up window that will ask the user if they want to edit the Work Order. Selecting “yes” brings the user to the details page and selecting no brings the user back to the work request finder.

Title: Preview Checklist in Recurring Work Order

- Users will now be prompted to select an asset to preview in the event a Recurring Work Order is not a single multi-asset work order otherwise it will show a preview of all the assets.

Title: Create a Project Screen

- Usability improvement: The “Add a File” and “Attached Existing File” are now visually tied to the Justification box.



Title: Project Finder Screen Improvements

- A new column has been added to the Project Finder Screen called “Project Manager”.

Work Flow Improvements

Title: Deleting Workflows

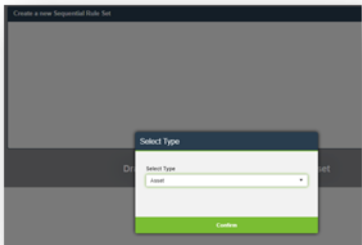
- It is now possible to delete workflows and all associated records.

Title: Workflow Finder

- The Workflow finder now allows workflow rules to be filtered by any number of selected object types.

Title: Sequential Rules

- When creating a sequential rule, the system prompts the User to select an object type.



Title: Editing Workflow Groups

- The edit option now appears when hovering the mouse over a workflow group.

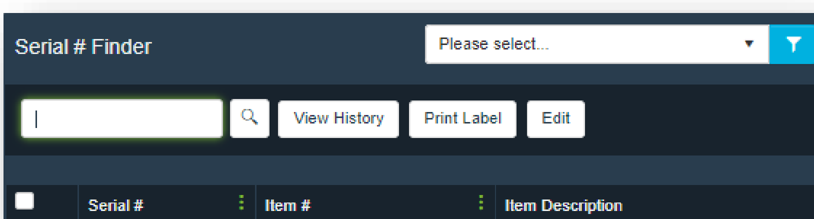
READYTrak

****Reorder list functionality has been moved from Inventory to Purchasing, as originally intended.**

Inventory Module Improvements

Title: Serialization

- Users can keep track of individual items and their attributes by unique serial numbers.
- Serialized Item Labels include the serial number and associated barcode.
- A Serial Number Finder has been added to facilitate searching by serial number.

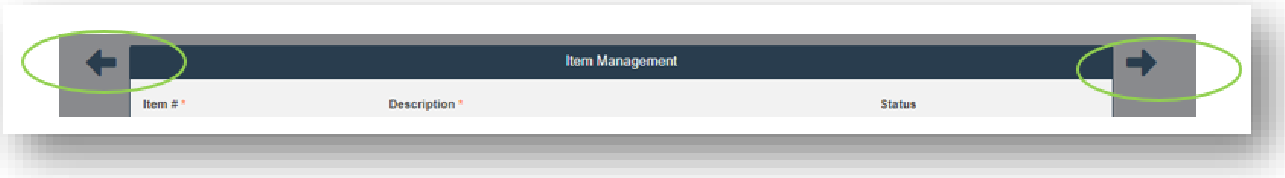


Title: Inventory Tab

- Users can add or edit stockrooms.
- Users can create or edit cycles for cycle count.
- Users can manually trigger the calculations to reload the reorder list, which will add or removes items based on the reorder criteria.

Title: Inventory Previous & Next Button

- Users can now navigate to previous or next inventory items. Navigation will be in alphabetical order.



Title: Inventory Purchasing – Unit of Measure

- Users can enter a new unit of measure inside the inventory card within system setup.
- Users can purchase inventory in different units than what is stocked.
- Users can “save on the fly” whenever a new unit is added.
- Users can edit or delete a unit of measure.
  - Note: Users cannot delete a unit of measure that is either in a Purchase Order history item or an in-stock item.
- A calculation button has been added that will show a User what the unit of measure they have selected will convert to.

Title: Inventory Transfer

- Inventory can be transferred from one stockroom to another via an immediate or a requested transfer.

Title: Cycle Count

- User can decide on the best methodology for counting inventory quantities (and valuations):
  - Choices include ad-hoc inventory counting, as well as the ability to create any combination of periodic or cycle based counting.
- There are two modes for data entry set via a system configuration:
  - Blind does not show the current system quantity.
  - Non-Blind would populate the current system quantity when an item is selected, scanned and entered.
- There are two modes for submission set via a system configuration:
  - Approval: Entered Items are put in a staging area for review and correction prior to approval.
  - Instant: All entered quantities are posted as adjustments to the corresponding items.
  -
- To accommodate this enhanced functionality, a new field called “Cycle” has been added to the Master Reordering View.

  - Users can add an item to a cycle from inside this View.
  - Only one item-stockroom combo can be on a cycle,
- Changes made to the inventory go through an approval process.
- Cycle Count functionality supports either serialized or non-serialized items.
- A new checkbox has been added to the item finder that will search only for items that can be added to a cycle count.
- Users can create, update, and delete cycle counts in the system setup under the Inventory Tab.
- When adding items to the cycle, it only allows items that are not on other cycles.
- An item can only be added to a cycle once, but you can have the same item from different stockrooms.
- Once items have been added to the cycle grid, Users can reorder the items by dragging them.
- At least one item must be on a cycle.

Purchasing Improvements

****Reorder list functionality has been moved from Inventory to Purchasing, as originally intended.**

Title: Adding Files to Vendors

- Users can now add files to a vendor from inside vendor details.

Title: Vendor Filtering

- While browsing organizational Vendors, a User can filter by a variety of criteria, as well as accurately calculate and aggregate column data.
- Filter options include: Vendor Id, Name, Alias, Stockroom(s), Vendor Class(es), Last Release Date, Last Lead Time, Average Lead Time, Expected Lead Time, Account Number, Taxable or Not Taxable, any text in the Address, as well as the ability to include Inactive Vendors.

Title: Auto Print on Release

- Now POs print immediately after being released from within PO Details and POs Waiting for Release.

Title: Update Tax Data on Purchase Order

- Clicking on the tax cell in the Line Item Grid, it will bring up a dialog box where the user can set the item as taxable.
- The user can override the tax on a line that is calculated from the stockroom.
- Changing the stockroom updates all applicable lines but does not overwrite the overridden tax line.
- Anytime the stockroom is changed it will recalculate the tax where applicable.

Title: PunchOut Functionality

- When a User selects a vendor inside a PO Entry that has the PunchOut set, it will show a button next to the dropdown that will allow them to PunchOut to that vendor.
- Once on the PunchOut website, Users can select items like any other shopping site
- Upon submitting their cart, it will transfer the items back into LLumin PO entry with the lines filled in.
  - At this point, the User cannot change the vendor.

    - Each of the vendor part numbers will be set to the item # on the PunchOut sites cart.
        - If it doesn't exist but there is a manufacturer part # or alt part # that will be used.
        - If neither exist, a default value (MISC0001) will be set per a system configuration called of "PunchOutItemNbr".

Title: Undo Receiving a Purchase Order

- For a received Purchase Order, the Receipt Card now has an Unreceive Button
- Users can specify a reason, as well as identify which lines should be unreceived, and the quantity to be reduced.
- When line is serialized and the User has selected a quantity less than the available unreceive quantity, the User must be able to choose the Serial Numbers that should be unreceived.
- Note: The User is only allowed to unreceive the minimum between the receipt line quantity and the remaining quantity.

Title: Past Purchase Orders

- Users with correct permissions may now print, view, release and receive purchase orders where the date expected is in the past.

Title: Purchase Request/Order Edit Permissions

- Users without Purchase Request edit permissions or Purchase Order edit permissions can no longer add lines to Purchase Requests or Purchase Orders that they are an approver on.

Title: Purchase Requisition Improvements

- To utilize this functionality a system configuration is set that disables the Purchase Order Entry screen.
- This results in Purchase Requisitions used in the software where Purchase Orders are normally used.
- A user can create a Purchase Requisition to build any Purchase Order in the software.

Title: eCommerce Credentials

- A new tab has been added to the vendor detail that allows the configuration of eCommerce credentials for a vendor.
- The “To”, “From”, and “Shared Secret” fields can be overridden on a stockroom by stockroom bases.

Title: Add New Lines to a Closed PO

- Based on a System Configuration setting, Users can add new lines to a closed PO as well as updating Purchase Order permissions.
    - This only applies to closed PO’s, not Released or Invoiced.
- In order to account for additional vendor charges after receiving a PO, the User can add non-inventory items (or empty item numbers) to the PO.
- This will create a receipt behind the scenes and keep the PO in a Closed Status.

Title: Stockroom Vendor Filtering

- An admin User can designate for any Vendor, a subset of Stockrooms. This is set on the Vendor Entry Screen in a new Card called “Stockroom”, where there is one checkbox for each of the organization's Stockrooms.

System Wide Improvements

Title: Attach Existing File

- Attach Existing File now accompanies any place in the software where Users could attach a file and/or shows relevant files.
- Asset Statuses can now be created and edited.
- The Organization now has a singular Organization tree view where Users may add, edit or delete part of their organization.
- An inventory tab has been created where Users have ability to do the following:
    - Add or edit stockrooms.
    - Create or edit cycles for cycle count.
    - Manually trigger the calculations to reload the reorder list.
    - Create and edit units of measurement.

Title: File Finder Functionality

- The File Finder functionality allows the User to find files anywhere in the system, no matter where they are or what they are attached to.
- Users can filter by name, description, file type, the object is it linked to, etc.
- Once implemented, it can be reused in different areas of the software.
- This functionality can be found in the system setup under 'Miscellaneous'.

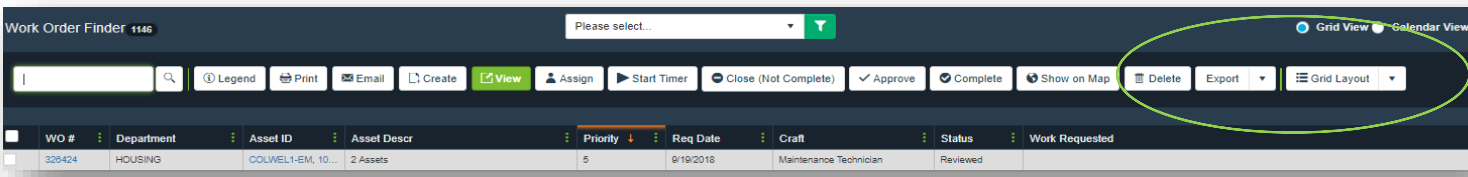
Title: Stockroom Auto-filter Functionality

- Users with the stockroom auto-filter set will no longer see information that does not apply to their stockroom, for example:
- User will only see appropriate information in the Vendor & Manufacturers drop-downs per the auto-filter.
- Calculations will adjust per the Stockroom Auto-filter.

Title: Finder Screen Improvements

- Custom Filters created can now be saved and used again at any time.
- "Project Manager" is now available in the Project Manager Finder grid
- "End Date" is now available on the Project Manager Finder grid
- The filter button will allow a User to select a previously saved filter as well as display the current filter name.
- A new column has been added that displays a camera icon. This is used to view an image saved for this item.
    - If there is no image, the camera icon will show as disabled.
- Cosmetic improvements have been made to the User interface.

- For example: Move the Grid Layout and Export buttons to the right side of the toolbar and make them appear in the overflow menu when the screen size is below the minimum for the toolbar to be completely visible.

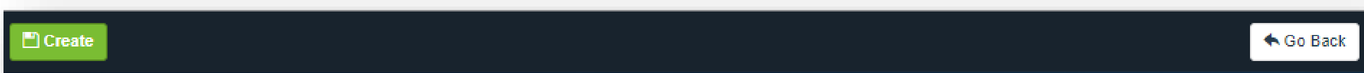


Title: Custom Validation Tabs

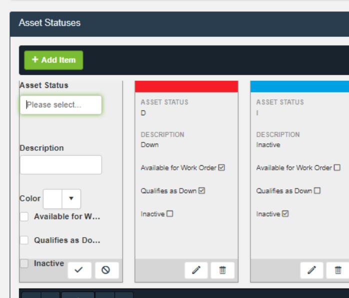
- A new Custom Validation Tab allows Users to preview what the validated list will look like.

Title: Create Screen Consistency

- To improved User experience and software consistency, the Create screens have the same toolbar at the bottom that the Detail screens do.



Application Set-Up & Configurations



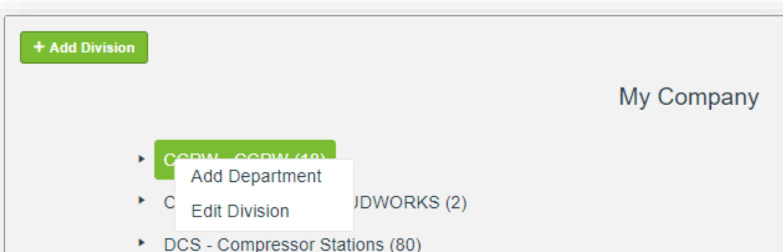
Application Setup Changes

Title: Asset Info Tab

- Asset Status can now be created and edited.

Title: Organization Tab

- Multiple grid views have been converted to a singular Organization Tree View where Users may add, edit or delete parts of their organization.



Title: Vendor Display Configuration

- Administrative Users can configure the system to display Vendors in drop down lists as "ID – Name" versus "Name".
- The system configuration checkbox is called "Display Vendors as ID – Name".

Title: Miscellaneous Tab - File Finder

- Users can find all files in the application no matter what they are attached to.
- The results can be filtered by several options.

Modules & Interfaces

Title: SCADA Condition Based Triggers Tab

- SCADA tags can now be linked to assets in the application.

Title: HMI Improvements to View Parts and Children

- There is a new button in the toolbar of the HMI Plugin grid called "Linked Parts".
- This allows you to view the parts linked to an Asset or any child of an Asset.
    - When clicked, this button will launch a popup window with the Asset Linked Parts grid for Asset corresponding to the selected grid row.
    - If no row is selected, the system will prompt the User to select one.
- This grid is read-only

Title: TPM Improvements / Completion

- Users can complete a TPM on an Asset from the HMI screen, if it has a TPM Procedure associated with it.
- Users will notice a button in the toolbar of the grid that says, "Complete a TPM".
    - When clicked, if the Asset does not have a TPM Procedure associated with it, the User will be informed of this.
    - If the Asset does have TPM Procedure, the Condition Assessment popup will appear, loading in the TPM Procedure.
        - This popup will save TPM data just as it would in the Asset Master.

Title: TPM Improvements / Multiple TPMs

- Users can now complete multiple TPM's if allowed via system configurations setting.
- As a point of reference, this works how it does inside WO details when completing a condition assessment, it shows each asset and the procedure checklist.
- The system configuration is called "Allow selecting multiple assets when completing a TPM".

***A variety of minor cosmetic fixes and minor bug fixes have been addressed in this release as well.**